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The Four Foundations of Onboarding Design Strategy

By Andrew Joly and Matt Donovan

New employee onboarding has always been understood as an important function of an organization. The pandemic, the rise of virtual and hybrid work, and our increasingly connected world have shifted employee expectations. Bringing learner-centric design components into the employee onboarding experience is now essential for the employee experience.

When, where, and how we work have completely transformed. How do we give learners—and new employees in particular—what they need as they move from high competence to high performance?

You likely spend countless hours recruiting, interviewing, deliberating on, and ultimately deciding to hire your candidates. But the work does not stop there: now you must help integrate this exceptional, technically competent person into your high-performing team. For a multitude of reasons, like lower employee turnover, higher employee satisfaction, and increased engagement, it is more important than ever to bring a new design strategy to onboarding and keep employees engaged from the start.

Read on to discover the four ways you can create an exceptional onboarding journey for your new employees to help ensure their future success as an individual and as part of your organization.

Why a Great Onboarding Experience Ensures Success

Onboarding is a pivotal component of an employee's journey with your company. First impressions make a significant impact, and every single experience your new employee has during this time sets the tone for their trajectory within your organization. You have a unique opportunity in these first days and weeks to align your brand with your employee experience in a way that does not exist further down the line.

To illustrate the impact of onboarding, let's picture a scenario. Imagine you were just hired at a technology company that creates products you have been loyal to for years and that has always provided you with excellent customer service. Your impression of their brand is quite high, as the experience that the company gives to its customers is outstanding, and you expect them to treat their employees with the same level of attention and positivity. You are eager to get started and become part of a company with such high standards. Now, imagine the impact of these two vastly different onboarding experiences:

Scenario 1

On your first day, you do not receive a call from your manager, and your computer and other equipment have not arrived yet. You use your personal computer, but you don't yet have access to your login information. You reach out to your point of contact and finally get access to your email, but you still have not had a meaningful manager connection.

Once you do log into the company's systems, you are alerted that you are already overdue for compliance training you did not know existed, you find that you have been booked out all week for a dozen video chat meet-and-greets, and you're still not sure who to go to for help.

Scenario 2

Two weeks before your start date, your direct manager calls you and walks you through how your first few days will go, lets you know when your equipment will arrive, and emails you with instructions for accessing your accounts on the first day. The week before you start, your equipment arrives with clear instructions. On your first day, your manager calls you in the morning to greet you and answer immediate questions you have.

You begin working on the onboarding materials that have been sent to your new work email; the content is clear, is delivered across multiple channels, and provides you with clear goals for the next several weeks. Your manager connects you with your team and introduces you to a collaborative, online social learning environment that includes others who have recently been hired.

The first situation will leave you feeling like the company operates chaotically, and you will not fully understand your role or responsibilities. From the start, you will feel undervalued and disengaged, a feeling that is hard to reverse. Scenario two, on the other hand, is completely aligned with the brand principles you have experienced as a customer. You feel excited, connected, appreciated, and engaged.

We spend a lot of time and energy thinking about our customer experience, but if we can bring even a portion of that attention to the learner experience, we can greatly impact our employee engagement and loyalty. So, how do you create that experience? It starts with developing a learner experience playbook.

The Learner Experience Playbook

If you want to create a more learner-centric environment, you need to first take stock of your entire learning ecosystem and consider everyone who has a stakeholdership in learner success. To do this, define your target audience and what they need and then determine who your top performers are. Who is already doing their job very well, and how do they do it well? What about the experience of our top performers can we replicate for our new employees? Use this as your benchmark of what “good” looks like and outline goals for onboarding.

After determining what your goals are, you will then need to consider how you might help others achieve those goals. At this point, tap into your subject matter experts to help develop content and provide context to the learning experience. Next up is to determine who will be part of your performance support network: who is going to coach, mentor, enable, and support your new employees?

Creating a playbook for your learner experience is, at its core, about creating relevance to harness the single most powerful force we have in our industry: the fact that people want to do a good job. We simply need to provide them with the tools to do it well. Creating a playbook for your onboarding experience can help to harness that powerful system.

6 Steps to Build a Learner Experience Playbook

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Who are you designing the experience for?

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Determine learner segmentation and representative personas.
- 2

What does “good” look like?

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Define the features of an outstanding learning experience and create a narrative of the broader learner journey.
- 3

What are you helping employees solve, achieve, and perform?

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Align with business outcomes.
- 4

What are your key learner touchpoints?

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Describe learning in terms of continuous experiences and determine engagement, entry, re-entry, and moments of learning need.
- 5

How do you support employees at the point of work and throughout moments of learning need?

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Identify and develop new roles for learning by mapping your learner environment.
- 6

What types of measurement would benefit the learning experience?

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Capture metrics and feedback according to your needs to prove and improve the learning experience.

Successful Onboarding: Four Key Strategies

Once you have a road map in place, you can begin creating your design strategy. When we discuss onboarding, we are specifically referring to integrating a newly hired, exceptionally competent candidate into the culture and workflow of your organization.

Great onboarding means providing a bridge for that new employee to take their excellence from their prior workplaces into your workplace, and this “bridge to excellence” should be deeply personalized.

Align Your People with Your Tomorrow

Almost everything we do is about strategic change and transformation. Often, our clients want to drive innovative ideas and concepts—like digital thinking, resilience, and a sustainability mindset—immediately. This means that your onboarding experience needs to help shape your current new hires for the future your organization is working towards. The people you have coming in now will be highly influential in two years, so gear onboarding toward the future you want to see, not what your organization is doing today and was doing yesterday. Create an onboarding experience that promotes the ideal learning behaviors of your ambitions.

It is vital to not only build your future ambitions into your onboarding program but also include how to drive it so that it is engaging and implemented into the work culture of your organization. Show your new hires what the best looks like, and then continue to deliver high-quality learning experiences. Make sure you do not disappoint them when they encounter the next piece of learning—your values and commitment to learning must be consistent throughout the entire employee experience.

Think About the Journey: Information Overload and Underload

Beginning a new job is always at least little overwhelming—learning about a new organization, remembering everyone’s names, figuring out how you fit into the culture—it is largely unavoidable. What we can absolutely avoid is overloading or underloading your new hires with information.

This speaks to the two biggest risks you might experience when it comes to onboarding: A) there is no real onboarding, and the employee doesn’t have enough information; or B) your onboarding program includes so much information, reading, and user interfaces that people cannot process the information. Each of these can be very damaging to the employee experience.



Try to take an onion skin design approach to onboarding. Sift through and decide what the learners most need to know and when that information will be necessary. Release information as new benchmarks are achieved. You may realize that providing a two-hour face-to-face meeting to go through company history really is not essential on the first day and that that time is probably better spent getting to know their immediate team and the tools they will be using that week.

One way to determine what users need and when is to identify behaviors in top performers you would like replicated and collect learner feedback as to what they actually need to know and at what point throughout their employee journey that became important. Keep it simple, do not overwhelm your new hires, and design your program to adapt to your learner stage.

Blend and Engage

It is uncommon to design a single learning event or component that doesn't connect with other learner touchpoints, and an onboarding program is a perfect point from which to set up other learning events for employees. You can begin to blend out their learning right from the start.

Providing a blended learning experience means offering multiple components of learning content with different modalities to engage the learner further, and to create effective, evolving journeys. If you think back to your most engaging learning experiences, they almost always involve more than one learning modality. Such memorable experiences may have involved a slide deck, a group discussion, an engaging instructor, video instruction, a game, and perhaps a quiz, poll, or collaborative activity to gauge or test learner knowledge.

Learners should know from the onset how they will be engaging with the material, so be sure to make it clear how the learning experience will unfold from the start. Consider how you can bring in elements of gamification, videos, virtual check-ins, and other mixed-media activities to further engage your new employees during onboarding.

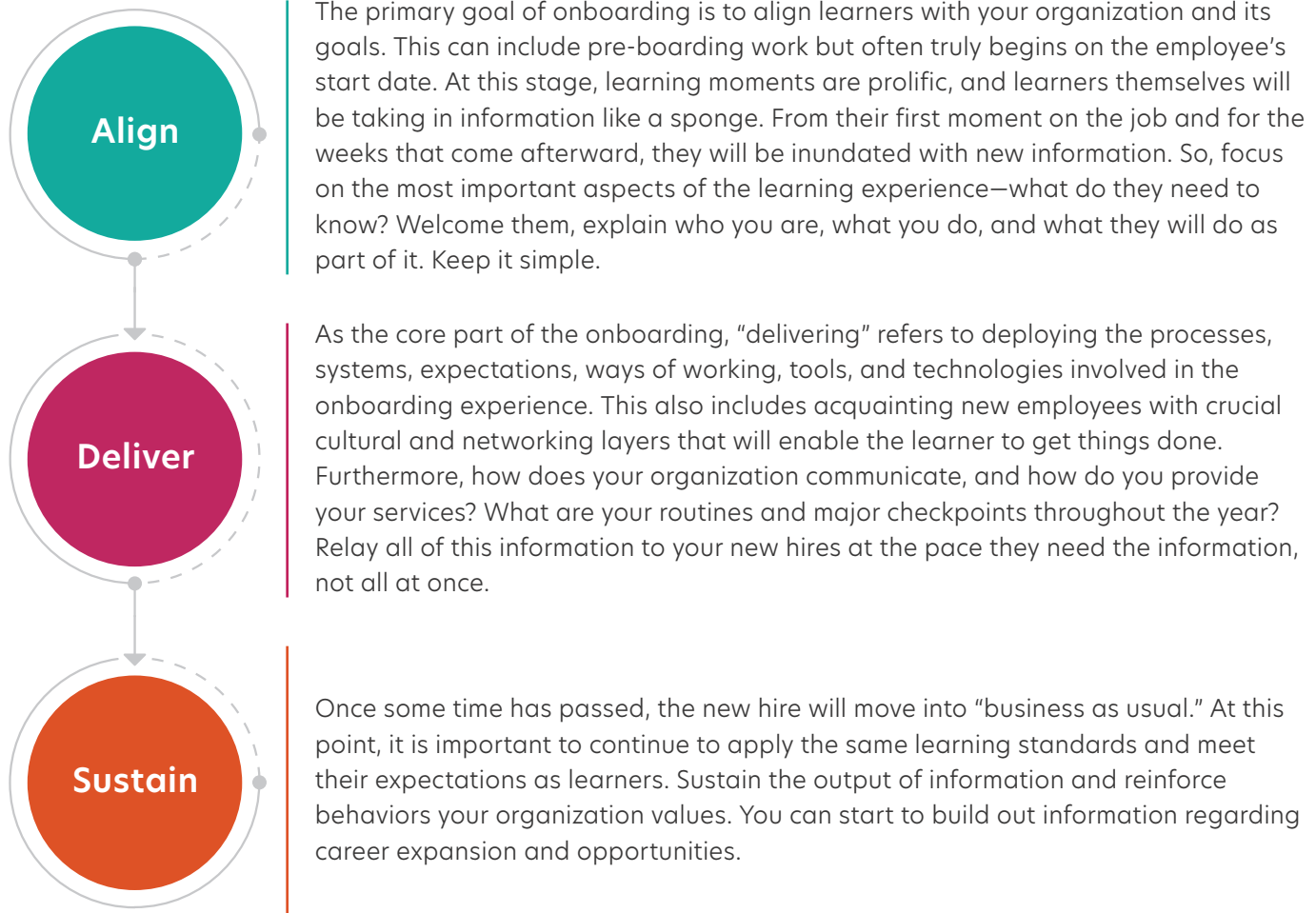
Another way to engage new hires in the onboarding process is to include mini celebrations at the end of every week for some time. Particularly for remote or hybrid employees, you may want to engineer that Friday afternoon, I-just-finished-my-first-week feeling. Digital components play an important role in this, but one way you engineer that feeling is by creating and sending a personalized note to build connection between the organization, the learning team, and the new hire.

Remember, the content you blend into the onboarding experience is going to span from deeply practical information delivery to creating an inviting environment.



First 100 Days: Align, Deliver, and Sustain

Many of our learning journeys are designed and underpinned with the Align, Deliver, and Sustain Model, and it works perfectly for situations like onboarding that can be spanned over longer periods. For the first 100 days, consider following this design model.



Final Thoughts on Successful Onboarding

The evolving landscape of work and the changing expectations of employees have necessitated a shift in the way organizations approach employee onboarding. Merely providing pathways to technical competence is no longer adequate.

To reap the benefits of reduced turnover, increased satisfaction, and improved engagement, organizations must adopt a new design strategy for onboarding, one that keeps employees engaged right from the start. This new approach must be learner-centric and account for the entire employee learning experience.

By implementing these strategies and designing an onboarding program that is aligned with the organization's brand and values, you can empower new employees and create lasting relationships. Adopting a comprehensive approach to onboarding not only benefits individuals but also contributes to the long-term success of the organization by nurturing high-performing individuals who are invested in its growth.

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